Mobile Broadcasting Workshop

Simon Wilson

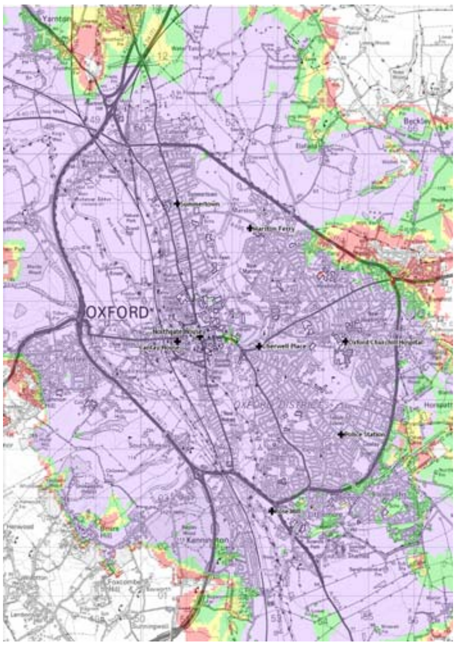
Spectrum Policy Manager

O2

simon.wilson@o2.com

Contents

- Mobile TV Myths
- Oxford Trial
  - Usage Levels
  - Category Champions
  - Other Feedback
- Implications
- Conclusions



Mobile TV Myths

- Mobile TV = Portable TV
- 3G can handle all the TV channel demand
- Linear programming is all we need
- TV is a poor experience on the small mobile screen
- Current network competition maintained for Mobile TV

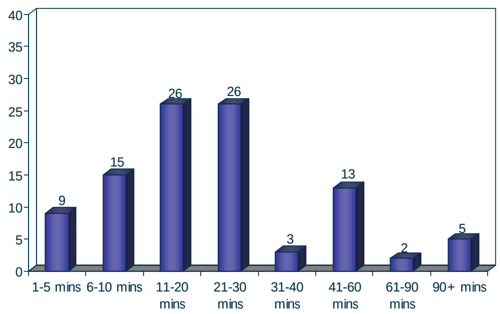
Usage Levels – How Much (%)

Weekly Viewing

- Over 3 hours per week

Viewing Durations

- Average 23 minutes per session
- Wide range of viewing durations
- Includes short and long-form programmes

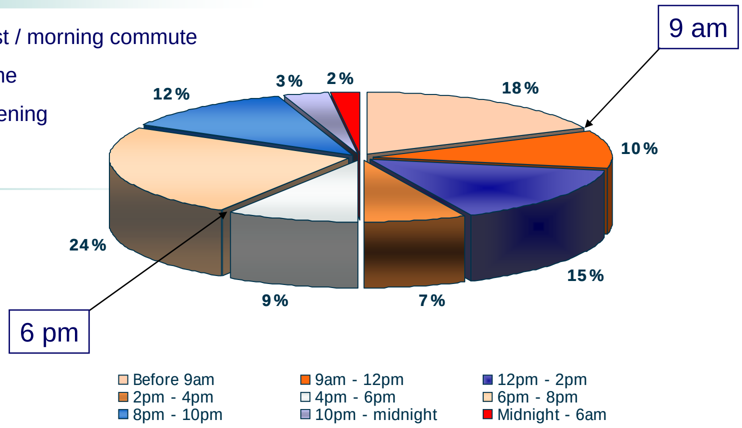


*Q: How long on average do you watch the mobile tv service at any one time?

Usage Levels – When

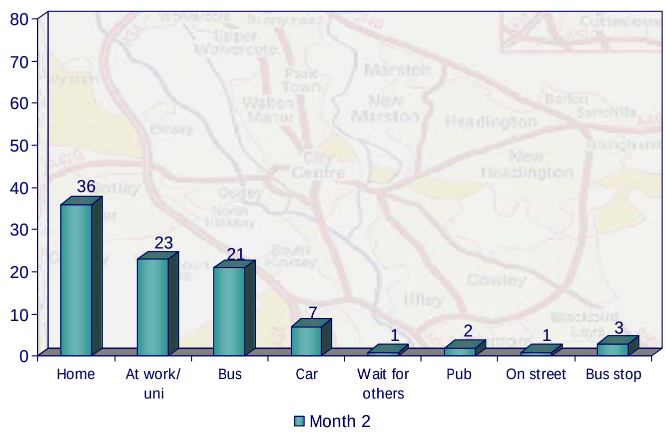
Viewing Peaks

- Breakfast / morning commute
- Lunchtime
- Early evening



*Q: When do you use the service most often?

Usage Levels – Where (%)



*Q: Where do you use the service most often (%)?

Category Champions (%)

16 Channel Line-up

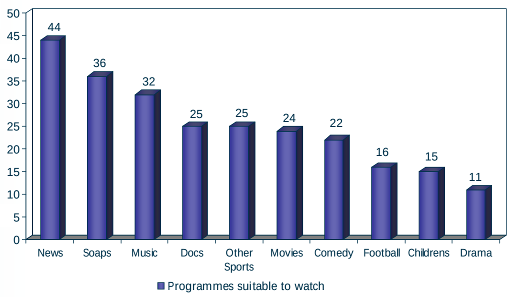
- Proving very popular
- Evidenced by 83% satisfaction level

Channel Branding Important

- 'Made for Mobile' content needs more development

Most Popular Genres

- News, Sports, Soaps, Music, Docs, Movies
- Lunch break - favourite daytime soaps



Other Feedback

High Satisfaction Levels

- 83% satisfied or better with the service

Satisfaction Drivers

- Choice of channels
- High Picture and Sound Quality
- Electronic Services Guide (ESG)

Other Feedback

Consumers also interested in:

- Digital radio channels
- PVR type functionality
- Interactive services
- Web links to broadcaster / other content

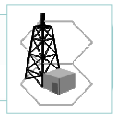
High Take-up Intentions

- 76% of triallists would take up service within 12 months at an acceptable price
- This demonstrates that the majority of triallists are prepared to pay for a service

23rd February 2006 Mobile Broadcast Workshop

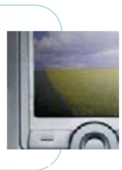
Implications

Coverage



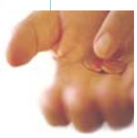
- In-building (home/office) and transportation (bus/car)

Content



- 16 channels
- Satisfaction driven by channel choice and picture quality
- 'Made for Mobile' needs more development

Cost



- High take-up possible if the price is right
- Minimising device costs requires:
  - economies of scale
  - international co-ordination of policy
  - harmonisation of spectrum

23rd February 2006 Mobile Broadcast Workshop

Conclusions

- ‘Mobile TV’ alone does not convey the demand we have seen
- In our Oxford trial we have seen high satisfaction and clear consumer demand
  - Home usage has exceeded our expectations
  - Channel choice is a clear driver of usage
  - Today’s channel brands offer the strongest category champions

  …but satisfying this consumer demand requires a full range of affordable devices with appropriate ESG to link to cellular capabilities
- ‘Personal TV’ will take us beyond broadcasting as we know it…

  …but **only** if we meet the spectrum demand through internationally co-ordinated policy and harmonised spectrum availability